



ELECTRONIC DOCUMENT MANAGEMENT SERVICE (EDMS)



SITE SURVEY DOCUMENT

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1 OVERVIEW

1.1 Summary

EDMS is a DAPS project aimed at facilitating the digitization, storage, and retrieval of the documents used daily at the Defense Distribution Centers. The system performs Optical Character Recognition (OCR) on digitized document images in order to extract searchable index data. The current solution includes the deployment of Government Furnished Materials (GFE) to each site in order to facilitate the operation of the system.

1.2 Purpose of Site Survey

The Phase II EDMS contract was awarded to Integic Corporation for deployment and installation of the EDMS system to several DDC Centers. Prior to installation, a team from Integic Corporation will visit the DAPS and DDC areas at each activity to perform a site survey. The Integic team will present an in brief to the DDC Commander and the DAPS Office Director. The briefing will be followed by familiarization tours of the Receiving, Inventory, and Transportation divisions, as well as detailed discussions with those functional managers. In addition, the survey team will discuss the IT infrastructure into which the EDMS system will be integrated with the IT managers.

Participation from both DAPS and DDC at these meetings and discussions is essential to establishing a mutual understanding of requirements and expectations regarding EDMS processes and work product.

1.3 Proposed Schedule

The following is the proposed EDMS site visit agenda. Please review the proposed schedule and provide feedback. If this agenda is not acceptable, please provide an alternative schedule.

Day One	
8:30 – 9:00	EDMS team arrives at base
10:00 – 12:00	In brief with Depot Commander and DAPS management. May include the DDC & DAPS technical staff and the Transportation, Receiving, and Inventory managers. Integric brief project approx 1 hr Questions 1 hr
12:00 – 1:00	Lunch
1:00 – 2:30	Meet with Receiving division managers and review operations
2:30 – 4:00	Meet with Transportation division management and review operations
Day Two	
8:00 – 9:30	Meet with Inventory division managers and review operations (as needed)
9:30 – 10:30	Meet with Other division managers and review operations
10:30 – 12:00	Meet and discuss system installation and operational environment with DDC and DAPS IT managers
12:00 – 1:00	Lunch
1:00 – 2:00	Discussions with DAPS Managers
2:00 – 3:00	Out-briefs as required

1.4 Notes

- The EDMS survey team will conform to the working schedules of the DDC and DAPS staff as much as possible when planning meetings.
- The introductory meeting between the EDMS team and the DDC and DAPS technical staffs is intended to provide a forum for discussing the details of the EDMS program.
- As appropriate, representatives from the local firewall team will need to attend the meeting with the DDC and DAPS IT staffs in order to discuss the opening of ports for inbound traffic from users to the Hub and outbound traffic for the IA server.
- Integric requests assistance in coordinating the briefings with the Center Commanders, their Deputies, and the DAPS Office Director. Other members of the DDC and DAPS staff, and the Inventory, Receiving and Transportation managers are invited to attend as well.
- Integric requests assistance in meeting the security requirements necessary for us to gain access to the base.

1.5 EDMS Program Points of Contact

Defense Distribution Center	
Mr. Tom Jablonski Project Manager (Integic) Defense Distribution Center 2001 Mission Drive, Build 54-2, DDC-J6 New Cumberland, PA 17070-5000	E-Mail: thomas.jablonski@integic.com Phone: (717) 770-5600 Fax: (717) 770-5858 DSN: 977-5600
Document Automation and Production Service	
Mr. Mark L. Konetski Project Manager (Integic) Headquarters, DAPS 5450 Carlisle Pike, Building 9 P.O. Box 2020 Mechanicsburg, PA 17055-0788	E-Mail: mkonetski@daps.dla.mil Phone: (717) 605-1284 Fax: (717) 605-3977 DSN: 430-1284
Integic Corporation	
Mr. Fariborz Mortezaee EDMS Program Manager 3675 Concorde Parkway, Suite 1500 Chantilly, Virginia 20151	E-Mail: fariborz.mortezaee@integic.com Phone: (703) 803-2250 Mobile: (703) 307-1377 Fax: (703) 803-2010

1.6 General Site Information

Please provide the information outlined in the following table. If a particular question is not applicable to your site, please enter "N/A" on the corresponding section.

Activity (Distribution Center / DAPS Facility)	
Survey Prepared By (Name)	
Mailing Address for Equipment Delivery and Any Special Instructions	
DDC Location / Building(s)	
DAPS Location / Building	
IT Staff Location / Building	
Is there a Records Management Plan or Disposal Plan for site documents?	

2 PERSONNEL

This section of the survey relates to both those employees who will be using the EDMS system for retrieval and those who will be operating the scan stations and OCR verification stations. Please answer the following questions and provide contact information for the functional areas of the site. If additional space is required, please use the "Comments" section at the end of this document.

2.1 Personnel Information

2.1.1 End User Information

The "end users" are those employees at your site that will be using the search and retrieval utilities of the EDMS system to retrieve document images.

End Users	
1. Approximately how many users will require access to the EDMS website for search and retrieval of document images?	
2. Do these users currently have web access? If so, what browser do they most commonly use?	
3. Do any of these end users have particular Section 508 concerns (sight or hearing impairments, physical impairments, etc.)?	
4. Do these users have the ability to manage their own workstations (e.g. install software, change the registry, etcetera)?	

2.1.2 Operations Team Information

The "operations team" is comprised of those DAPS personnel that will be sorting the documents at the scan station, operating the scanners, using the Optical Character Recognition (OCR) software, and checking the integrity of the data extracted from the forms.

Operations Team	
1. How many people will be available to operate the EDMS system?	
2. Do the prospective operations team personnel have any physical limitations (including sight or hearing impairments)?	
3. Do any members of the prospective operations team have experience with scanners, scanning software, or OCR software?	
4. Will these personnel have the ability to manage the EDMS workstations (e.g. install software)?	

2.2 Site Points of Contact

Please provide contact information for the following functional areas.

	Main DDC	Main DAPS	Receiving	Inventory	Transport	IT	Security
Name							
Title							
Phone							
DSN							
Fax							
E-Mail							
Location							

3 INFORMATION TECHNOLOGY

This section of the survey refers to the network, hardware, and software topography of the site, as well as the facilities infrastructure. Much of the information provided in this section will be used to assess the compatibility of standard EDMS configurations with the existing system. If additional space is required, please use the "Comments" section at the end of this document.

LAN Environment			
1. On whose network will the EDMS be installed?	DAPS <input type="checkbox"/> DDC <input type="checkbox"/> ETN (DLA) <input type="checkbox"/> Other (please specify) <input type="checkbox"/> _____		
2. What type of network connectivity will there be for the EDMS system?	Hub <input type="checkbox"/>	Switch <input type="checkbox"/>	
3. Is NIPERNET connectivity available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
4. Will the servers and workstations be physically co-located?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
5. Will all servers and workstations be on the same subnet and domain?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
6. Are additional network drops and IP addresses available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
7. Will static IP addresses be available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
8. Is the network DHCP or static?	DHCP <input type="checkbox"/>	Static <input type="checkbox"/>	
9. Does the firewall have DMZ capabilities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
10. What is the approximate bandwidth capacity of the network?			
LAN Security			
1. EDMS requires both intranet and Internet connectivity. Will they be available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
2. Will SSL access be available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
3. Does the firewall have DMZ capabilities?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
4. What type of remote access is available?			

Power			
1. EDMS system requires 110 volt / 30 amp power (L5-30P connectors). Will this type of power connectivity be available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
2. Is a centralized UPS infrastructure available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Other IT Topics			
1. Are centralized backup capabilities available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
2. EDMS includes Norton Antivirus protection software. Does this conflict with on-site network standards?			
3. EDMS is a Windows 2000 based system. Are there any issues with integrating Windows 2000 into the current network environment?			
4. Please denote the server and workstation naming conventions that EDMS must meet. By default, EDMS uses DAPS naming conventions.			
5. Does the server room have sufficient cooling and ventilation systems to accommodate the EDMS hardware?			

4 FACILITIES

This section of the survey addresses pragmatic concerns for contractors visiting the base, including access issues and the availability of training facilities. If additional space is required, or if important issues have not been addressed in these questions, please use the "Comments" section at the end of the document for further clarification

Base Access			
1. What steps must be taken for contractors to gain access to the base (pre-arrival security forms, badges, etc.)?			
2. Is a security clearance needed? If so, what clearance level is required?			
3. What are the working hours of the base?			
4. Can contractors stay past the designated working hours?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
5. Must contractors be escorted at all times on the base?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Server Room and Scan Station Location			
1. What group or organization is responsible for oversight of the server room?			
2. Does the server room have unique working hours?			
3. EDMS requires working space for operations such as document sorting, preparation, scanning and possibly additional workstations and scanners. Is this required space available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
4. Is space available for hard copy storage of documents during the different phases of processing (documents awaiting scanning, documents awaiting verification, backlogs, etc.)?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Training Facilities			
1. Are training facilities available on-site?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

5 EXISTING SOLUTIONS

This section is used to identify and gather information about any existing digitized solution that may be employed at this site for the management of documents.

System Configuration			
1. What scanning equipment is being utilized (e.g. scanner makes and models, workstations, etc.)? How many scanners are in use?			
2. What operating system and COTS software products are being utilized?			
Scanning, Retrieval, and Procedures			
1. Can documents be searched for and retrieved through a web interface?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
2. What index data is being stored for the documents? Can users search by any of these pieces of data?			
3. List the documents that are currently being digitized (e.g. DD250, DD1348, all Receiving documents, etcetera)			
4. After scanning, are the hard copies of the documents stored or disposed? If stored, are they being retained for a specific length of time?			
5. What kind of reports does the current system generate (e.g. a report on the number of documents scanned in the last month)?			
6. Will the data in this system have to be incorporated into EDMS in the future?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
7. Do the documents have to be brought to the scanning area from another location? If so, who is responsible for bringing them and returning them?			
8. Do new documents need to be available for retrieval by a certain time after they are sent to the scanning area (is there an expected turnaround time)?			
Personnel			
1. How many personnel are used to operate the scan stations? On how many shifts?			

EDMS Site Survey

2. Who has administrative rights to modify the index data collected?	
3. What is the general level of computer literacy of the system operators?	

6 DOCUMENTS

Information in this section will assist in identification of documents (forms) that are used in various functional areas of your organization.

Receiving			
1. Please estimate the number of DD250's, DD1348's, and other documents that will require scanning (a per day, per week, or per month estimate is fine).			
2. Do you plan to use the WAWF form in place of the standard DD250? If yes, as of what date?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
3. Do you plan to use barcoded DD250's?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
4. Do you plan to use DD1348's with a 2-D barcode?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
5. Do you use the DD1149 and/or DD1155 documents? Approximately how many per month would need scanning?			
6. What other types of documents do you regularly use? In what volume? Would these documents need to be scanned independently or are they attachments to a DD250 or other document (e.g. under a DD250 "cover sheet")? Are samples available?			
7. Aside from DD1348's, do you use any irregularly sized documents?			
8. What type of document do you use if no paperwork is received with a shipment?			
9. Do any of your documents require special records management consideration? If so, how long will they have to be stored?			
10. Do any documents require duplex scanning (both sides of the document have information that needs to be captured)?			
11. Do you use a Receipt Control Number (RCN)? Would it be a useful piece of information for retrieving a document image?			
12. Do you use an Operation Control Number (OCN)? Is it a necessary piece of information for retrieving a particular type of document? Is it generally handwritten or typed/stamped?			
13. What are the main index points on each of your major documents (e.g. Contract Number, NSN, and Order/Call Number on DD250's)? Please include only those fields that you <i>must</i> be able to search by in order to find the document.			
14. Are samples of your documents available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	

Transportation			
1. Please estimate the number of CBL's, GBL's, and other documents that will require scanning (a per day, per week, or per month estimate is fine).			
2. What type of document do you use for local deliveries?			
3. Would you be able to retrieve your CBL's and GBL's if you could search by Bill Number? If you could search by Bill Number of Transportation Control Number?			
4. Do any of your documents require special records management consideration? If so, how long will they have to be stored?			
5. Do any documents require duplex scanning (both sides of the document have information that needs to be captured)?			
6. What other types of documents do you regularly use? In what volume? Would these documents need to be scanned independently or are they attachments to another document (e.g. under a CBL/GBL "cover sheet")? Are they created locally? Are they printed out of DSS?			
7. What are the main index points on each of your major documents (e.g. Bill Number for CBL's)? Please include only those fields that you <i>must</i> be able to search by in order to find the document.			
8. Are samples of your documents available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Inventory			
1. Please estimate the number of documents created by your area (a per day, per week, or per month estimate is fine).			
2. Do you think it would be useful to be able to search for these documents electronically?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
3. Do your research packages have a standard header sheet? If so, what is it? Is it printed out of DSS? Please explain.			
4. Do you use the standard SF361, SF364, or SF368 discrepancy report forms? In what volume? Are they currently available online?			
5. Do you use the DD200 form? Approximately how many do you use per month?			

6. Do you use Adjustment Vouchers, Warehouse Denial forms, or Inventory Reconciliations? Would they require scanning? Approximately how many do you use per month?			
7. How are your research packages currently stored? Are they sorted by date or other criteria?			
8. What other types of documents do you regularly use that would not be "attachments" to the cover sheet of the research package? How many of each of these documents do you generally receive?			
9. What type of index data would you use to search for each of your major documents or types of research packages (for example, the NSN, an SDR Number, a Report Number, a control number from a DSS screen)? Please explain.			
10. Are samples of your documents available?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	